

ENDOWMENT FUNDS PROPOSAL CHECKLIST

FY 2009/2010

Before submitting your Proposal, please check the following:

- ☐ Have you answered every question?
- ☐ Have you signed the PROPOSAL (Page 2)?
- ☐ Have you submitted an **original** of the Proposal?
- ☐ Have you included **one** copy of the most recent audited financial statement and management letter? (note: the Independent Auditor's Report is not the same as a Management Letter)
- ☐ Have you included **all** Agency Documentation requested? (Agency Documentation Checklist)
- ☐ Have you sent an electronic copy of your proposal to hsgrants@scottsdaleaz.gov? (Please do not include your agency documentation in the email.)
- ☐ Have you read the Eligible Activities & General Information sheet?

**Scottsdale Endowment Proposal
FY 2009/2010**

Date:

1. Proposal for use of Endowment Funds:
2. Department or Agency requesting funding:
3. Name and telephone number of contact:
4. Brief description of program and need (community problem) for which funds are being requested:
5. Amount requested (please break out costs):
6. Describe how the funds will be used:
7. What is the time frame that funds will be used?
8. What will you use to measure and evaluate the success of the program?
9. What need will be filled and who will benefit?
10. Have you pursued other funding sources? Yes ____ No ____ If so, describe:

City of Scottsdale Endowment Proposal FY 2009/10

11. How long will requested funding benefit this program?

12. Do you receive funds from other sources for this program/need? Yes___ No___
If so, describe:

13. Will requested funds displace tax dollars? (for City of Scottsdale programs only)
Yes ___No ___ If so, describe:

14. Identify program collaborative partners that enhance your program's ability to create community impact; include any innovative networking/leverage-producing partnerships. Describe how these collaborations enhance added value to program services. Be specific.

15. If your program is not recommended for Endowment funding, would you accept funding from another source within the city (i.e. CDBG, General Funds or Scottsdale Cares)?

Requested by: _____ Title: _____

Date Signed: _____

*Attach additional information if necessary

AGENCY DOCUMENTATION

The following documentation is required from all non-profit agencies. Please label all attachments as "Agency Documentation # ____:

- 1. Most current audited financial statement and management letter**
- 2. Copy of the original IRS determination letter indicating 501(c)3 tax exempt status** (if never funded or revised)
- 3. Certification of Current Tax Exempt Status of Grantee Organization (See attached)**

Agency Documentation #_____

**CERTIFICATION OF TAX EXEMPT
STATUS OF GRANTEE ORGANIZATION**

I, an Officer/Director of

(Organization)

hereby certify that the organization has received a ruling from the Internal Revenue Service that it is exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code and that the organization is not a private foundation as defined in Section 509 (a) of the Internal Revenue Code.

I further certify that said exemption rulings from the Internal Revenue Service are still in effect and have not been revoked or amended.

Signature

Name (please print)

Title

Date